Bitrix Site manager 4.0

A Guide to Selling Content

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Introduction

This guide is intended for users of the Bitrix Site Manager 4.0.17. The guide contains a detailed description of the new functions introduced in the version 4.0.17 enabling users to sell content on their sites.

The guide envisages and depicts an example of creating a content catalogue, customizing the system modules and setting up for selling access to the Photo Gallery site section.

Approaches to Selling Content

The content selling technology is built upon the access permission distribution which is the basic principle of the Bitrix Site Manager. Each user group is granted a unique set of permissions allowing their members to obtain access to the specific piece of information. When visitors buy a specific information, they are added to a list of members allowed to access the purchased content.

Hence, the content selling process comes to selling the user group access permissions. Access permissions may be sold for a definite period of time (subscription) as well as without time restriction.

Generally, the content selling process involves the following actions:

§ creating a user group allowed to access the required information resources;

§ enabling the user group access permissions to be sold;

§ creating and customizing a commercial catalogue to be used for content selling;

§ setting up the e-store;

§ publishing the content to be sold;

§ receiving and processing orders.

Creating and customizing a user group

The present manual depicts an example of granting paid access to the Photo Gallery site section. Since the content selling is based on granting membership in user groups whose members have required access permissions, the first thing to do is create and set up a user group whose membership is to be sold.

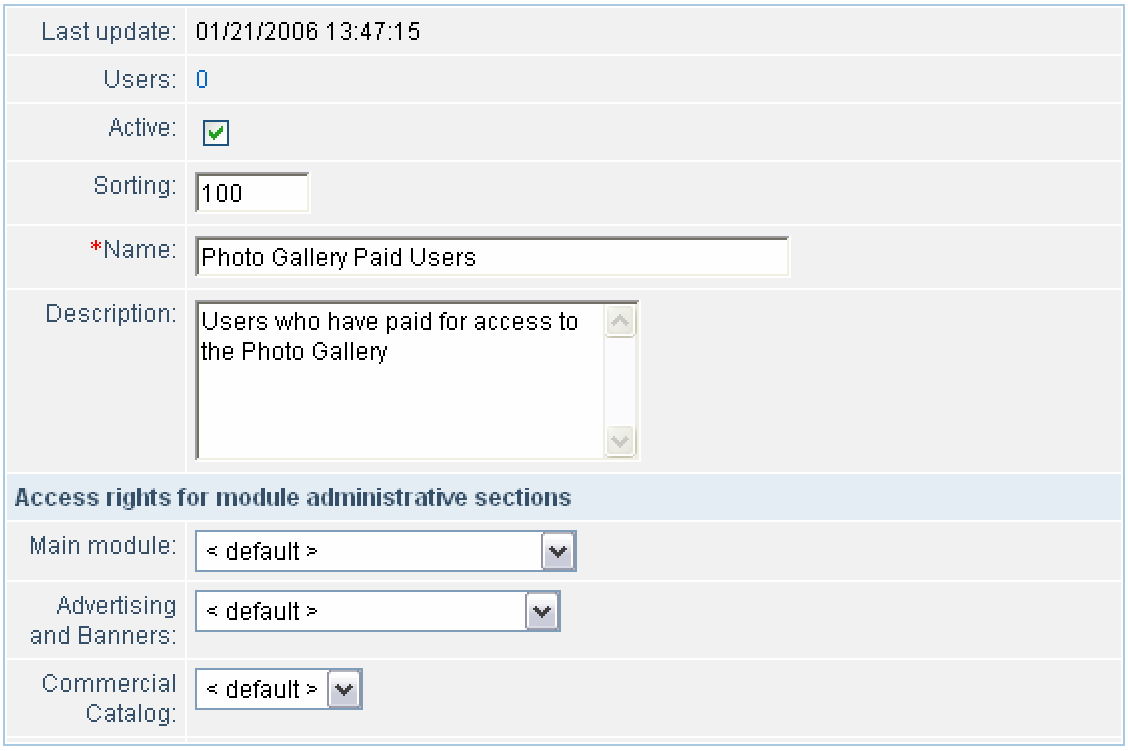
Creating a user group

1. Start creating a new user group:

   § open a page containing the list of user groups: *Administrative section* -> **Manage users** -> **User groups**;

   § click **Add >>**.

2. Specify the following parameters on the group adding page:



   § **Sorting**: the sort “weight” of the new group. This value is used when displaying the user group name in lists. The less is the value, the higher the group name is positioned in lists;

   § **Name**: name of the new group. This field is required;

   § **Description**: arbitrary description of the group;

   § **Access rights for module administrative sections**: this group is used to specify permissions of the group to access administrative sections of the system modules. Since users of the new group should be able to access only the public information, we have to leave these fields set to default.

3. Click **Add** to add the new group.

Setting up the user group permissions

Now we have to make the following amendments to allow users of the **Photo Gallery Paid Users** group to access the **Photo Gallery** site section. All changes are made using the **Site Explorer** module.

1. Go to the site explorer: *Administrative section* -> **Site Explorer** -> **Browse**;
2. Choose the folder containing elements of the required section. In our case, this is the ***about/gallery/*** folder.
3. For the **Photo Gallery Paid Users** user group, set the **Read** permission to access the **Photo Gallery** section (folder ***about/gallery/***). To do so, select the gallery folder by checking the corresponding box, and click the **Access** button.

Group	Access level	Current access level
Everyone:	Inherit [Read]	Inherit
Content editors:	Inherit [Deny]	Inherit
Partners:	Inherit [Deny]	Inherit
Photo Gallery Paid Users:	Read	Inherit
e-Store Managers:	Inherit [Deny]	Inherit
All groups with "Inherit" access level	Inherit	Inherit

> **Important!**
> To disallow members of other user groups to access this section, set their access permission level to **Deny**.

4. Save changes by clicking **Save**.

Enabling to sell the user group access permissions

The following settings have to be altered in the **Commercial Catalog** module to put up the access to the **Photo Gallery** for sale.

1. Open the **Commercial Catalog** module settings page: *Administrative section* -> **Settings** -> select **Commercial Catalog** in the drop-down list.
2. Selling access to any resource implies, in fact, selling the access permissions of a certain user group. This is why we have to mark the required group as the one the access to which can be sold. To do so, check the appropriate box in the **Available for sale** column:

User group	Available for sale
e-Store Managers	☐
Registered users	☐
Administrators	☐
Photo Gallery Paid Users	☑

3. Click **Save** to confirm changes.

Creating a catalog for selling access permissions

You have to perform the following operations to allow your visitors to purchase access to the paid sections of your site:

- create a catalog containing the access services you wish to put on sale;
- set up the catalogue as a commercial catalogue so that it can be used to sell content;
- publish the new catalogue.

Creating the catalogue of access services

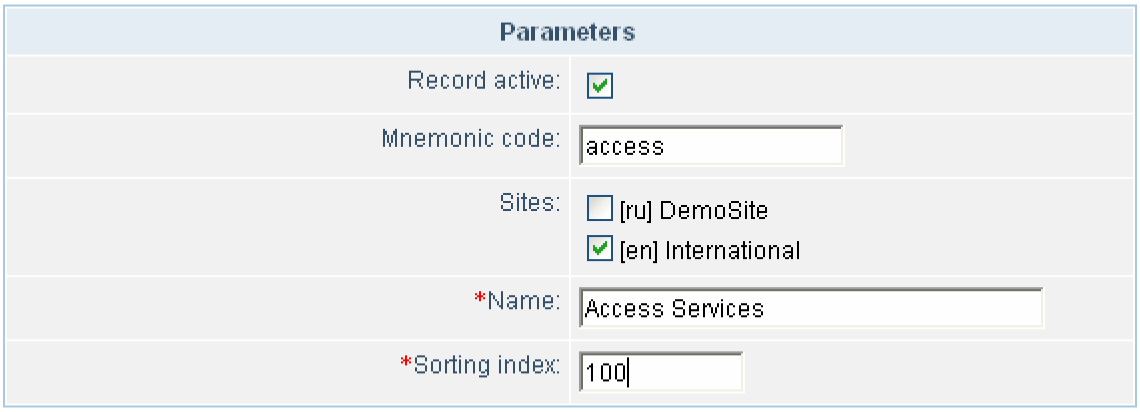
The catalog used to offer access services is created from an information block. The access services on sale are formed as the information block elements.

> **Warning!**
> You must have the **Information Blocks** module installed to perform content selling.

1. Open the page containing the list of information blocks (information block types; e.g. Catalog): *Administrative section* -> **Information blocks** -> **Catalog**.

   Note: you can use any existing information block type to create the access service catalog.

2. Switch to creating a new information block, e.g. **Access services** by clicking the button **Add >>**.
3. Specify parameters of the new information block.

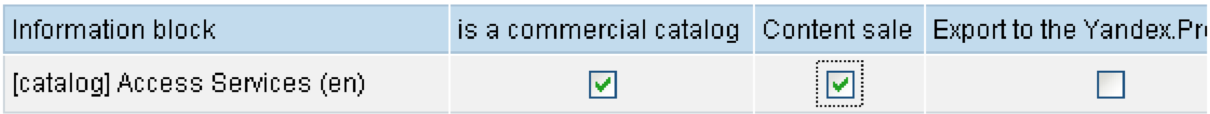


4. Save the new information block by clicking **Add**.

Enabling the catalogue to sell content

The created information block should be set up as the catalogue enabled to sell information content. To do so, we need to perform the following actions.

1. Open the Commercial Catalog module settings page: *Administrative section* -> **System settings** -> **Settings** -> select **Commercial Catalog** in the drop-down list.
2. Scroll to the list of information blocks and find the **Access services** information block.
3. Mark the options **Content sale** and **Is commercial catalog** of the required information block.



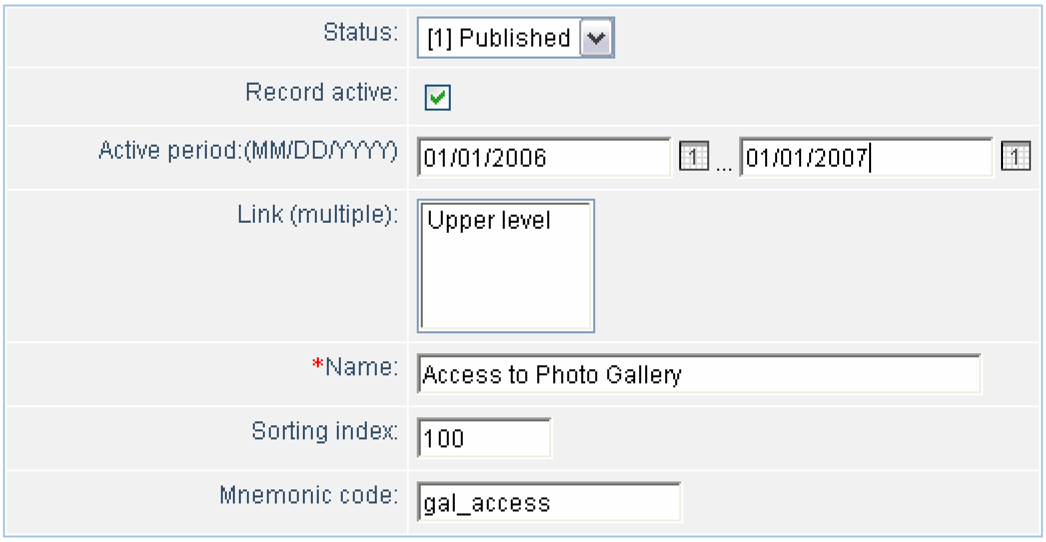
4. Apply changes by clicking **Save**.

Adding elements to the catalogue

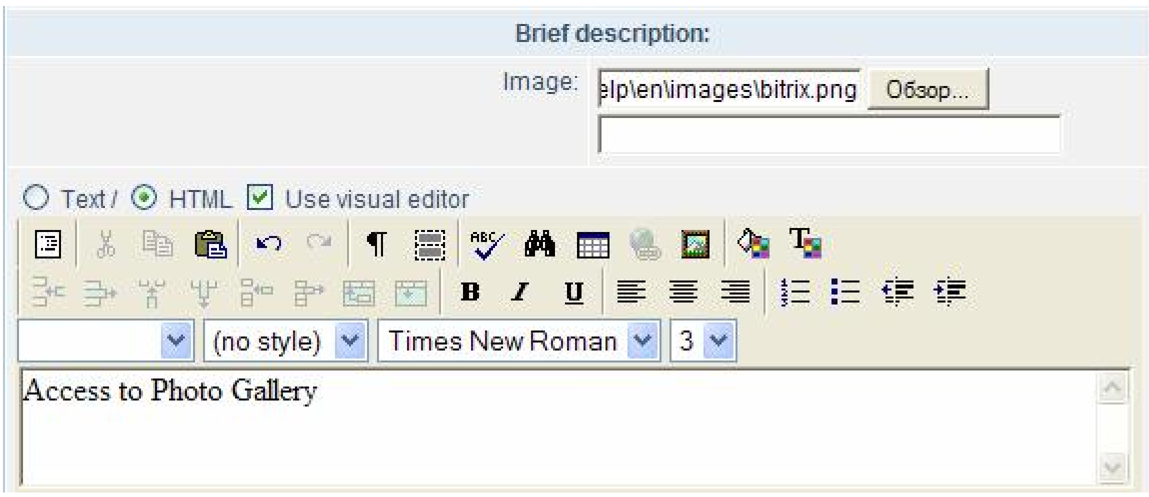
The content access services are offered to the site visitors in the form of product catalog elements (in our case, the **Access services** catalog).

1. Open the page containing the list of the **Catalog** information blocks: *Administrative section* -> **Information blocks** -> **Catalog**.
2. Find the **Access services** information block in the list, and click the link titled after the information block element name (e.g. *Products*) in the **Actions** column.
3. Switch to the new element adding page by clicking **Add >>**.
4. The first section of the element adding page is common to all elements of information blocks:

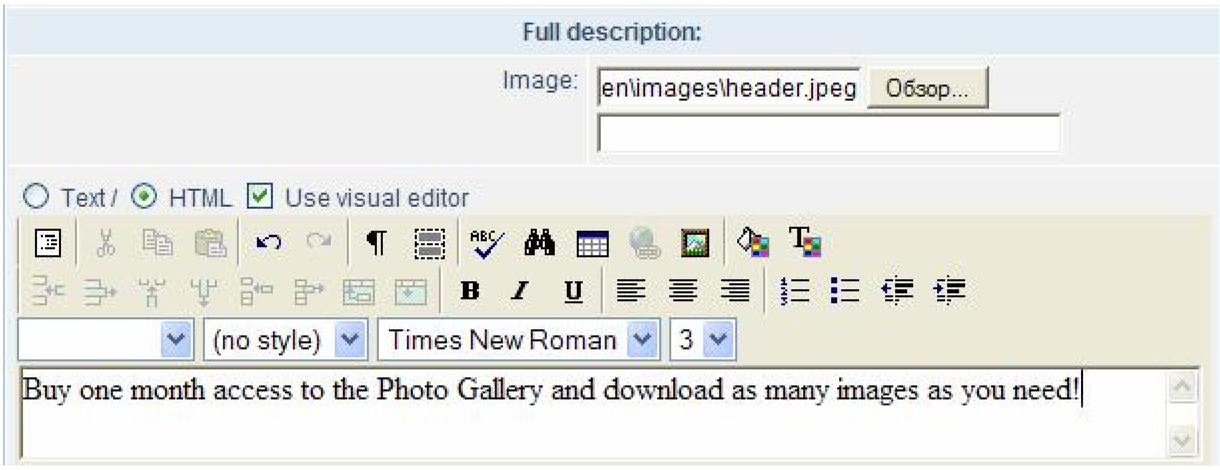
   4.1. specify parameters of the product:



§ type the brief description:



§ provide the full description for detailed view:



5. Since we have chosen the **Access services** information block as the content selling catalog, the **Commercial catalog** section will be displayed at the bottom of the form.

   5.1. Select the **Prices** tab. Specify the price of our service here.

§ **Base price**: specify here the value of the base price. Values of the other price types for this product (service) will be derived from the base price.

§ **Base price currency**: select here the currency in which the base price is specified.

§ **Price type**: type of the product price (in our case, the product is the access service).

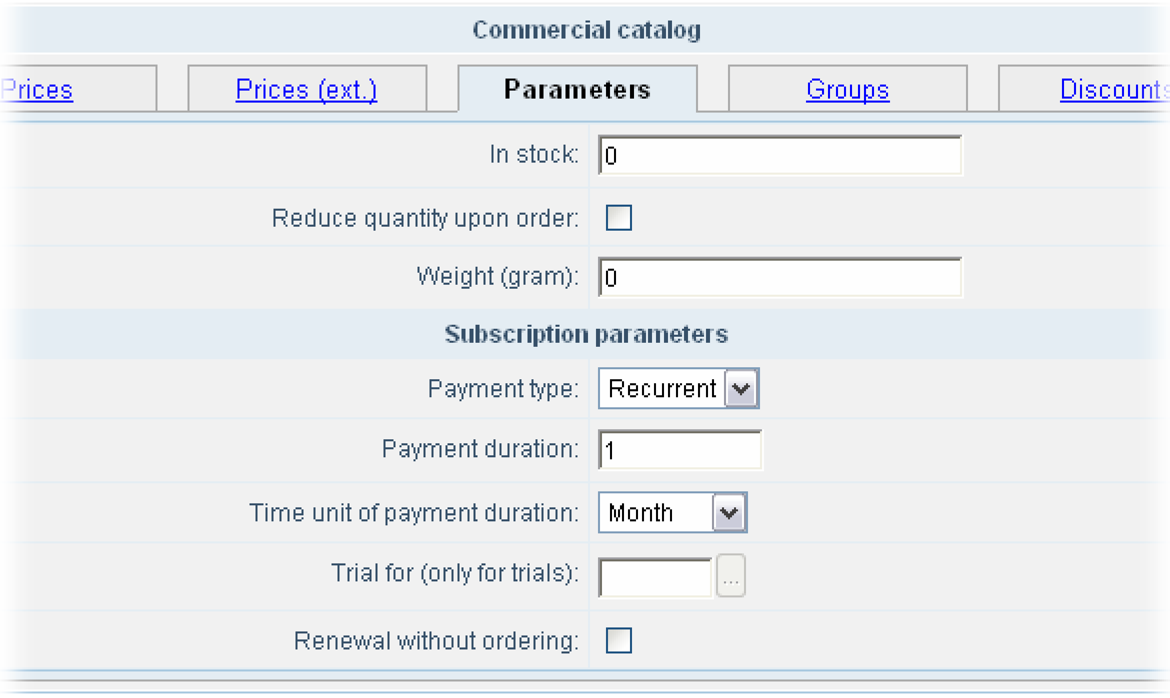
§ **Type of extra**: value of extra used to calculate the product price for this price type.

§ **Amount**: the product price for this price type. If the type of extra is selected, the amount is calculated automatically.

§ **Currency**: currency in which the product price is specified for the corresponding price type. If the type of extra is selected, the base currency is always selected.

> **Note!**
> Types of prices and extras pertain to and can be specified in the **Commercial catalog** module. Currencies can be added in the **Currencies** module.

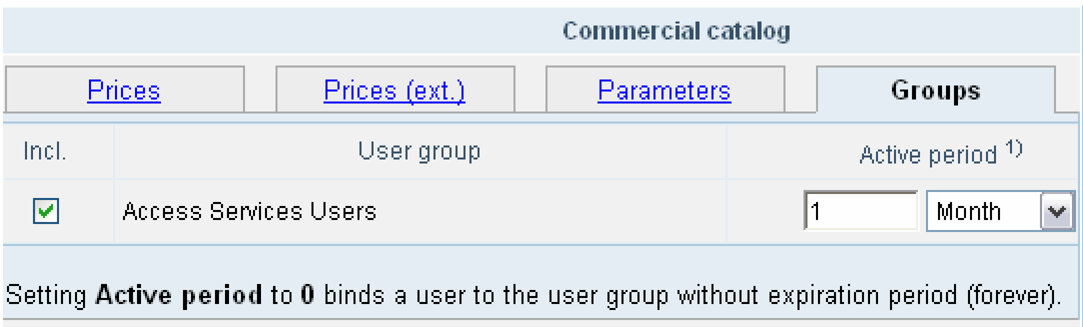
   5.2. Select the **Parameters** tab. Settings of this tab are used to customize parameters of the content access subscription.



- In the **Payment type** field, select how payments are to be organized:
  - **One-time**: means that a customer pays for the service only once, and no recurring fees will apply;
  - **Recurrent**: implies periodical payments to be made, once within the specified period. After the period expires, the system automatically bills the customer for the *subscription* renewal;
  - **Trial**: after the trial period expires, the system offers the customer to purchase the full version of a product or service.

  In our case, we want to organize a time-limited subscription for the access to the **Photo Gallery** section. This means that our customers will be allowed to buy access to the section for a limited period of time.
- Recurring types of payment requires the length of the access validity period to be provided (the **Payment duration** field). After the period expires, the customer will receive a notification with a bill to be paid for prolonging the subscription. Also, the **time unit of payment duration** has to be selected. In our case, we set the unit to 1 month.
- **Trial** type of payment requires the full version of the product or service to be specified in the **Trial for** field.
- **Recurrent** payments allow enabling the **Renewal without ordering** option. If this is the case, the fact of subscription renewal will entail calculating the order amount, whereas the order object will not be created in the system. This may be useful for small regular payments to be withdrawn from a user's internal account.

5.3. Switch to the **Groups** tab. Select user group(s) whose temporary member a user is to be made. Then, select the duration of such membership.



In our case, users will be made members of (bound to) the **Access Services Users** group for 1 month from the day of payment.

6. Save the created service by clicking **Add >>**.

Now, we have created the content selling catalog **Access services**. The catalog has one product added (**Photo gallery access**), whose purchase allows using the **Photo gallery** section during 1 month.

Setting up the e-Store

The processes of selling and billing the content, as well as the order processing are all handled using the **e-Store** module functions. Hence, we customize parameters of these operations on the **e-Store** module pages.

Adjusting the staff permissions for order processing

In our example, we render charge of the order processing and management to personnel with permissions "**Order processing**". This level of permissions allows to process orders, while prohibiting any changes to the **e-Store** module settings.

1. Open the **e-Store** module settings page: *Administrative section* -> **Settings** -> select **e-Store** in the drop-down list.

2. In the **Additional site parameters** group, select user group(s) that is allowed to access orders of your site.

§ **Site**: name of the site whose orders are to be made accessible by members of the selected group;

§ **Currency**: specify name of the base currency for this site;

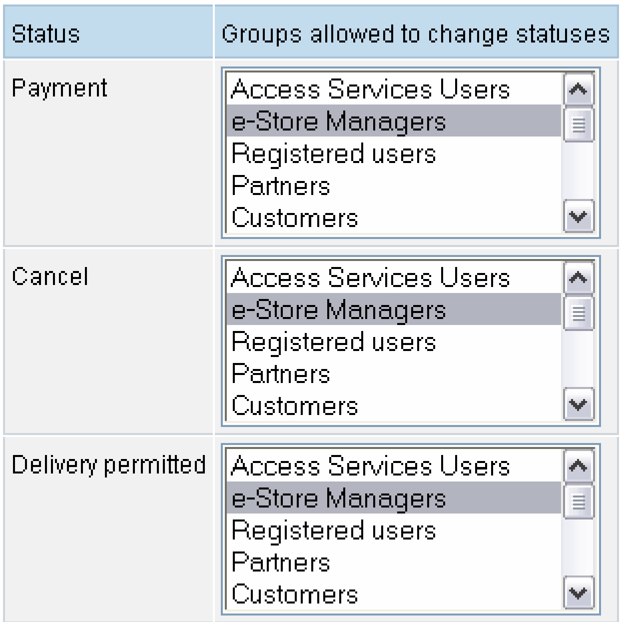
§ **Groups allowed to access orders of the site**: select user groups that will be able to access orders of the site.

> **Note!**
> Each site may be assigned its own user group allowed to process orders.

In our case, members of the **e-Store Managers** group are set to be in charge of the order processing. This group has to be created using the **Users** module in advance, having the permission to access the **e-Store** module set to **Manage orders**.

3. Scroll to the **Permissions to change order state** section. Here we need to select user groups allowed to change the ***order states***.

> **Note**. *Order states* (statuses) are used to inform clients and the **e-Store** personnel on the current state of orders and operations currently being performed to the orders. There are two types of states.
>
> **State statuses**. These statuses are preset and reflect the current state of order: **Paid, Canceled, Delivery permitted**. You can change permissions to access orders in these statuses using the **e-Store** module settings page.
>
> **Information statuses**. These statuses reflect stages of order during the processing. You can create any number of information statuses, depending on how your workflow is organized. For example: **Delayed**, **In process**, **Shipped**, **En route**. You can customize information statuses and alter permissions to access orders in one or another status using the **Statuses** form of the **e-Store** module.



In our case, we grant permission to change order states to members of the **e-Store Managers** group.

4. Apply changes by clicking **Save**.

5. Next, we have to set up user permissions for ***information statuses*** of orders, which indicate different stages of the order processing. You can view the list of all information statuses on the **Order statuses** page (*Administrative section* -> **e-Store** -> **e-Store settings** -> select **Order statuses** link). The following two statuses are preset and cannot be deleted:

   § **Accepted** – indicates that the order has been received by the e-store staff;

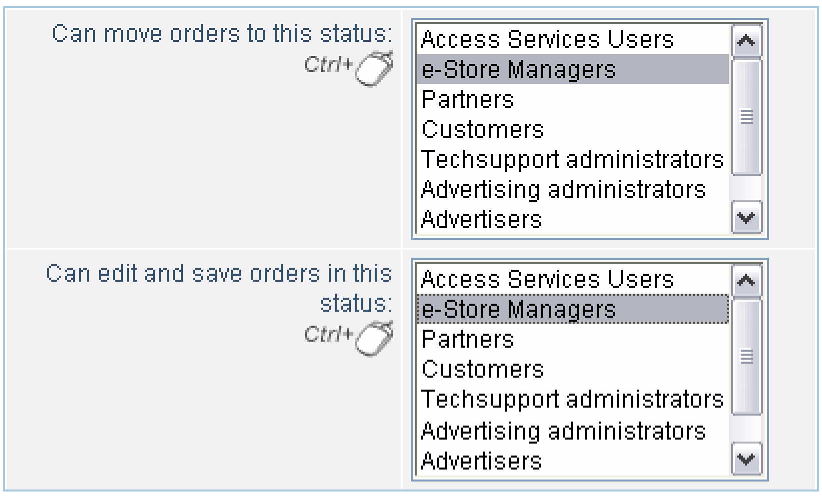
   § **Delivered** - indicates that the order items have been delivered to the customer.

   You can create as many statuses as you need (for example: *in process*, *shipped*). Click **Add** to add a new status.

6. Since all the orders are attributed to members of the **e-Store Managers** group, we have to set up their permissions to order statuses.

   § Go to the **Order statuses** page: *Administrative section* -> **e-Store** -> **e-Store settings** -> select **Order statuses** link;

   § Adjust parameters of each status in the status editing form (click **Modify** in the **Actions** column):



For each status, specify that the members of the **e-Store Managers** group can:

§ move orders to this status;

§ edit orders in this status.

§ Click **Save** to apply changes made.

Now that we have finished with these alterations, users of the **e-Store Managers** group are entitled to handle orders in any status, but only of the specified site.

Providing the credit card handling security

Security of the credit card operations are ensured by creating the unique password, and selecting the required algorithm for the credit card number encryption.

1. Open the **e-Store** module settings page: *Administrative section* -> **Settings** -> select **e-Store** in the drop-down list.
2. Scroll to the **Credit card number encryption** section:

Parameter name	Parameter value
Path to key file	php_interface/include/sale/sale_data.php
Encryption algorithm Raw data produced by different algorithms are mutually incompatible. You must not change algorithm if there are encrypted information.	RC4

§ In the **Path to key file**, specify the full path to the PHP file containing the encryption password.

You have to create this file manually. The file can have any name and can be stored in any folder of the server (the file can be placed anywhere, but it must be accessible by the PHP engine). The file should define the variable **$pwdString**, whose value must be set to the credit card number encryption password.

> **Important!**
> Your password should form a senseless mixture of letters and digits, at least 20 symbols.

The product contains a sample key file (with empty password): **/bitrix/modules/sale/install/data.php**.

§ Select the **Encryption algorithm**. The RC4 algorithm does not require additional modules. The algorithms AES and 3DES require the PHP module **Mcrypt** to be installed.

> **Note!**
> Encryption algorithms are mutually incompatible. You will not be able to change algorithm after the site starts functioning (e.g. real credit card numbers appear in the database).

3. Apply settings by clicking **Save**.

Setting up the payment system

Among other numerous features, the **e-Store** module allows:

§ create various order payment means (payment systems);

§ use these payment systems with your sites.

The list of payment systems can be viewed on the **Payment systems** page: *Administrative section* -> **e-Store** -> **e-Store settings** -> select the **Payment systems** link.

§ Click **Add** to create a new payment system.

§ To change properties of an existing payment system, click the **Modify** link in the **Actions** column.

Putting up and selling content

Publishing the catalog

To allow your visitors to purchase products and/or services, you need to set up the catalog to be displayed in the public section of the site – that is, *publish* the catalog.

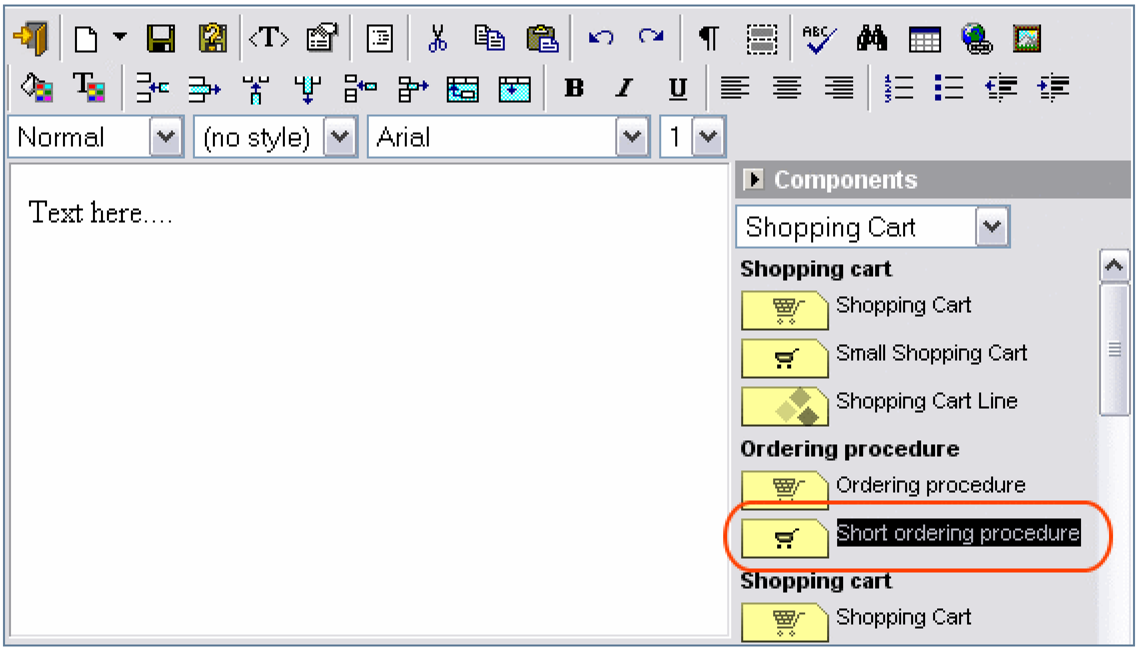
Publishing the catalog can be easily performed by using standard visual components of the **Information blocks** module. Visual components can be used when creating and editing a page with the visual HTML editor.

Setting up the client's personal section

Special visual components (**e-Store** module, **Personal section** group) simplify creating pages on which users can view information on their orders, state of the internal account, view and edit profiles; view and correct parameters of the forthcoming payment for products whose payment type is set to "***Recurrent***". You can create such pages by simply inserting the appropriate component(s) in the visual HTML editor.

At the installation time, the **e-Store** module automatically offers to create personal section pages. Sample personal section pages are available in ***/bitrix/modules/sale/install/public/***.

It is recommended to use the **Short ordering procedure** component for selling content.



Processing the content acquisition orders

The system treats the acquisition (purchase) of content as obtaining temporary or permanent membership in the previously created and properly prepared user group. After a user places a content acquisition order, the corresponding record is created in the database, which can be viewed on the order processing page: *Administrative section* -> **e-Store** -> **Orders**. The record representing a content acquisition order can be processed by members of the following user groups:

- the site administrators;
- the **e-Store** module administrators;
- other user groups with sufficient permissions to access orders of the site in their current status.

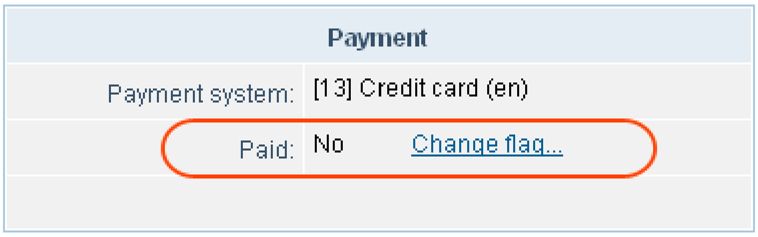
The requirement for a product (service) to be shipped to a customer is assigning the "***Delivery approved***" status to the order.

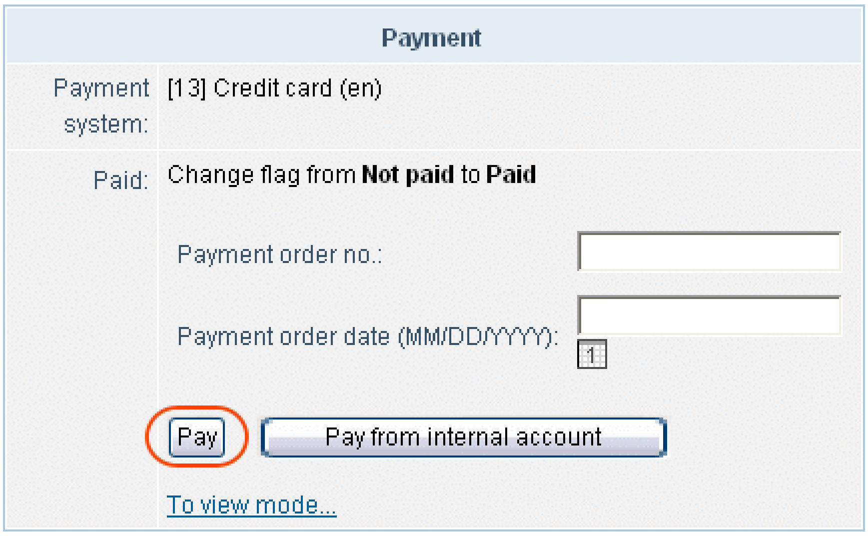
Order payments

The system keeps track and records all the transactions executed during the process of the order payment. You can view the list of transactions on the **Transactions** page: *Administrative section* -> **e-Store** -> **Transactions**.

If the payment system (that a user chose to pay for the order) processes payments immediately, the transaction is recorded and the order status is automatically changed to ***Paid***.

If the payment system delays payments (e.g. wire transfer, invoice), the order status have to be changed manually from **Not paid** to **Paid** (click **Change flag**):





The **Pay from internal account** button can be clicked if the user's internal account has sufficient funds and if they must be used for the payment.